



# **China Textile and Apparel Production and Sales Statistics, 2013-2014**

**Jul. 2014**

## **STUDY GOAL AND OBJECTIVES**

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## **REPORT OBJECTIVES**

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## **METHODOLOGY**

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## **INFORMATION SOURCES**

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

China textile & apparel industry has been in a transitional period of adjustment since 2013, featuring the following operating characteristics:

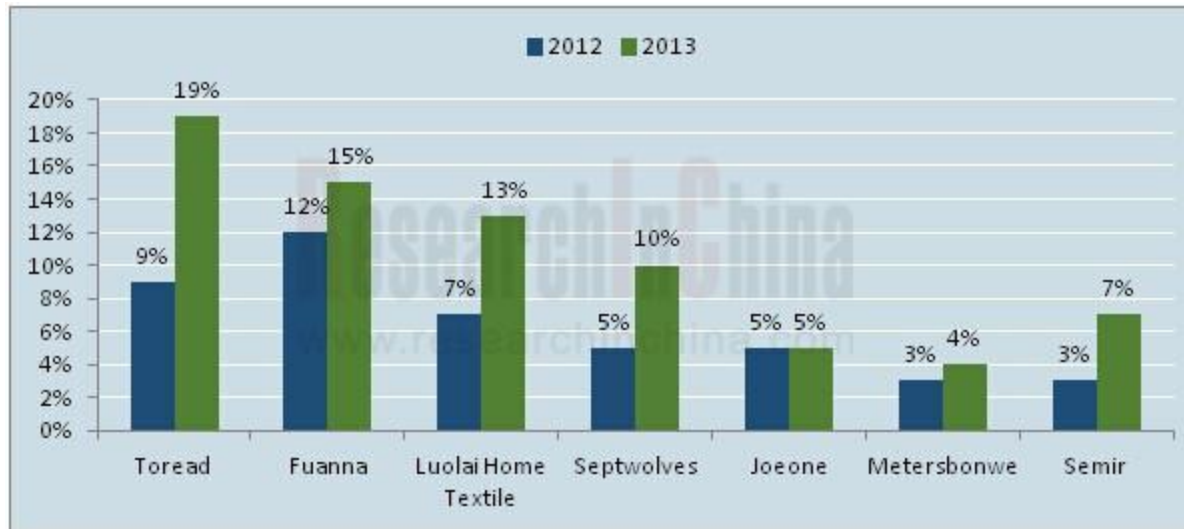
**Cotton purchasing and storage policy termination causes price decline.** In January 2014, the State Council issued the Several Opinions Comprehensively on Deepening Rural Reform and Accelerating Agricultural Modernization, whereby the temporary policy for purchasing and stockpiling cotton was cancelled. For textile & apparel companies, in the short term, the gross margin will be reduced as a result of cotton price decline, raw material inventory depreciation and falling product prices. However, in the long run, the lower production cost is helpful to improve gross margin.

**Output Growth Continues to Slow.** Over the past three years (2011-2013), the output growth of Chinese clothing enterprises above designated size fell from 17.68% in early 2010 to 1.27% in December 2013, with that in 2013 retreating by 4.93 percentage points against 2012, 6.87 percentage points from 2011, and 17.33 percentage points over 2010, showing an apparent slowdown.

**Online business burgeons.** Compared with the sluggish growth of traditional channel consumption, the online channel of textile & apparel companies has seen rapid development, with proportion of sales in total revenue rising year by year. In the first quarter of 2014, China's online retail sales exceeded RMB557 billion, a jump of nearly 46%, accounting for 9% of total volume of retail sales, thus becoming a new growth engine for domestic demand.

**Apparel retail sales still stumble along the bottom, and subsectors divide.** Due to the double blow of consumer recession and shunt of online channel, brand apparel sector that is heavily dependent on traditional offline channel is still in adjustment. In May 2014, the apparel retail sales of China's top 100 large retailers saw a year-on-year increase of 5.4%, still 0.7 percentage points slower than that of the same period of last year.

## % of Online Business in Total Revenue of China's Textile & Apparel Brands, 2012-2013



Source: China Textile & Apparel Production & Sales Statistics, 2013-2014

After three years of adjustment, the division of subsectors in brand apparel sector is even more apparent, with casual clothes and home textiles casting off high inventory and the market resuming growth, children's apparel and outdoors wear enjoying huge space for development, and menswear and high-end men and women wear being in a period of adjustment in the short run.

China Textile & Apparel Production & Sales Statistics, 2013-2014 by ResearchInChina contains 40 charts, fully displaying output of apparel, textile, leather footwear and headwear, overall sales of key department stores, and sales volume of apparel in China during 2011-2014, in the hope of providing objective and accurate reference data for relevant research institutions.

### **Preface**

#### **1. Output of China's Textile and Apparel Industry**

1.1 Apparel Output

1.2 Textile Output

1.3 Leather Footwear and Headwear Output

#### **2. Sales of China's Textile and Apparel Industry**

2.1 Overall Sales of China's Key Department Stores

2.2 Sales Volume by Apparel Type

- Monthly Output of Apparel in China, 2011-2014
- Monthly Output of Knitted Apparel in China, 2011-2014
- Monthly Output of Woven Apparel in China, 2011-2014
- Monthly Output of Down Wear Apparel in China, 2011-2014
- Monthly Output of Western-style Suit in China, 2011-2014
- Monthly Output of Shirt in China, 2011-2012
- Monthly Output of Leather Apparel in China, 2011-2014
- Monthly Output of Natural Fur Apparel in China, 2011-2014
- Monthly Output of Cloth in China, 2011-2014
- Monthly Output of Yarn in China, 2011-2014
- Monthly Output of Natural Silk and Interwoven Machine Fabric (Natural Silk Contained  $\geq 50\%$ ), 2011-2014
- Monthly Output of Yarn-dyed Cloth (including Jeans Cloth) in China, 2011-2014
- Monthly Output of Cotton Fabric in China, 2011-2014
- Monthly Output of Cotton Blended Fabric in China, 2011-2014
- Monthly Output of Chemical Fiber Cloth in China, 2011-2013
- Monthly Output of Printing and Dyeing Cloth in China, 2011-2014
- Monthly Output of Yarn (Wool) in China, 2011-2014
- Monthly Output of Wool Woven Fabric (Woolen Cloth) in China, 2011-2014
- Monthly Output of Linen (Flax Contained  $\geq 55\%$ ) in China, 2011-2013
- Monthly Output of Ramie Fabric (Ramie Contained  $\geq 55\%$ ) in China, 2011-2013
- Monthly Output of Cord Fabric in China, 2011-2014
- Monthly Output of Non-woven Cloth (Non-woven Fabric) in China, 2011-2014
- Monthly Output of Light Leather in China, 2011-2014
- Monthly Output of Leather Footwear in China, 2011-2014
- Monthly Sales of Commodities of China's Key Large Department Stores, 2011-2013

- Monthly Sales Volume of Women's Apparel of China's Key Large Department Stores, 2011-2013
- Monthly Sales Volume of Children's Apparel of China's Key Large Department Stores, 2011-2013
- Monthly Sales Volume of Jeans Wear of China's Key Large Department Stores, 2011-2013
- Monthly Sales Volume of Jacket of China's Key Large Department Stores, 2011-2013
- Monthly Sales Volume of Cold Protective Clothes of China's Key Large Department Stores, 2011-2013
- Monthly Sales Volume of Trousers of China's Key Large Department Stores, 2011-2013
- Monthly Sales Volume of Knitted Underwear of China's Key Large Department Stores, 2011-2013
- Monthly Sales Volume of Cashmere and Wool Sweater of China's Key Large Department Stores, 2011-2013

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